

# **THE EUROPEAN MARKET FOR THERMAL INSULATION PRODUCTS**

**Volume 11 – Other Western European  
Countries  
(Austria, Benelux, Ireland, Portugal, Switzerland)**

**© IAL CONSULTANTS  
APRIL 2006**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL  
Tel: +44 (0) 20 8832 7780 Fax: +44 (0) 20 8566 4931  
Email: ial@brg.co.uk  
Web site: [www.ialconsultants.com](http://www.ialconsultants.com)

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

---

## **NOTE**

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many IAL reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of IAL Consultants to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

## **MORE INFORMATION ON IAL CONSULTANTS**

Full details on all IAL Consultants published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website :

**[www.ialconsultants.com](http://www.ialconsultants.com)**

---

# CONTENTS

<b>1. INTRODUCTION.....</b>	<b>1</b>
1.1 SCOPE OF THE STUDY .....	1
1.2 METHODOLOGY.....	1
1.3 PRODUCTS COVERED .....	1
1.3.1 Mineral Fibres .....	1
1.3.2 Expanded Polystyrene (EPS) .....	2
1.3.3 Extruded Polystyrene (XPS).....	2
1.3.4 Polyurethane Foams .....	2
1.3.5 Phenolic Foams.....	3
1.3.6 Flexible Insulation .....	4
1.4 END-USE SECTORS .....	4
1.4.1 Building.....	4
1.4.2 Industrial.....	5
1.5 PRICES .....	5
1.5.1 Other Countries.....	6
1.5.2 Austria.....	7
1.5.3 Benelux.....	8
1.5.4 Ireland.....	9
1.5.5 Portugal .....	10
1.5.6 Switzerland.....	11
1.6 UNITS OF VOLUME.....	12
1.6.1 Other Countries.....	13
1.6.2 Austria.....	14
1.6.3 Benelux.....	15
1.6.4 Ireland.....	16
1.6.5 Portugal .....	17
1.6.6 Switzerland.....	18
1.7 FORECASTS .....	19
<b>2. MARKET SUMMARY AND FORECAST TO 2010.....</b>	<b>21</b>
2.1 MARKET REVIEW – 2005 .....	21
2.1.1 Other Western European Countries.....	21
2.1.2 Austria.....	24
2.1.3 Benelux.....	27
2.1.4 Ireland.....	30
2.1.5 Portugal .....	33
2.1.6 Switzerland.....	36
2.2 MARKET FORECAST – 2010.....	39
2.2.1 Other Western European Countries.....	39
2.2.2 Austria.....	42
2.2.3 Benelux.....	45
2.2.4 Ireland.....	48
2.2.5 Portugal .....	51
2.2.6 Switzerland.....	54
<b>3. MARKET REVIEW .....</b>	<b>57</b>
3.1 OTHER WESTERN EUROPEAN COUNTRIES BY MATERIAL TYPE – 2005-2010 .....	57
3.2 OTHER WESTERN EUROPEAN COUNTRY MARKET BY END-USE APPLICATION – 2005-2010.....	59
3.3 OTHER WESTERN EUROPEAN COUNTRIES MARKET IN BUILDING & INDUSTRY – 2005 .....	61
3.4 OTHER WESTERN EUROPEAN COUNTRIES GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	63

3.5	OTHER WESTERN EUROPEAN COUNTRIES GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2005-2010 .....	64
3.6	THE AUSTRIAN MARKET BY MATERIAL TYPE - 2005-2010.....	65
3.7	THE AUSTRIAN MARKET BY END-USE APPLICATION - 2005-2010 .....	67
3.8	THE AUSTRIAN MARKET IN BUILDING & INDUSTRY – 2005.....	69
3.9	AUSTRIAN GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010 .....	71
3.10	AUSTRIAN GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010 ..	72
3.11	THE BENELUX MARKET BY MATERIAL TYPE – 2005-2010 .....	73
3.12	THE BENELUX MARKET BY END-USE APPLICATION – 2005-2010.....	75
3.13	THE BENELUX MARKET IN BUILDING & INDUSTRY - 2005.....	77
3.14	BENELUX GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010 .....	79
3.15	BENELUX GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010....	80
3.16	THE IRISH MARKET BY MATERIAL TYPE – 2005-2010.....	81
3.17	THE IRISH MARKET BY END-USE APPLICATION – 2005-2010 .....	83
3.18	THE IRISH MARKET IN BUILDING & INDUSTRY - 2005 .....	85
3.19	IRISH GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	87
3.20	IRISH GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010 .....	88
3.21	THE PORTUGUESE MARKET BY MATERIAL TYPE – 2005-2010 .....	89
3.22	THE PORTUGUESE MARKET BY END-USE APPLICATION – 2005-2010.....	91
3.23	THE PORTUGUESE MARKET IN BUILDING & INDUSTRY - 2005.....	93
3.24	PORTUGUESE GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010 .....	95
3.25	PORTUGUESE GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010.....	96
3.26	THE SWISS MARKET BY MATERIAL TYPE – 2005-2010 .....	97
3.27	THE SWISS MARKET BY END-USE APPLICATION – 2005-2010.....	99
3.28	THE SWISS MARKET IN BUILDING & INDUSTRY - 2005.....	101
3.29	SWISS GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	103
3.30	SWISS GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010.....	104
<b>4.</b>	<b>MARKET INFLUENCES .....</b>	<b>105</b>
4.1	MACROECONOMIC TRENDS .....	105
4.1.1	<i>The Austrian Construction Industry.....</i>	<i>105</i>
4.1.2	<i>The Belgian Construction Industry.....</i>	<i>106</i>
4.1.3	<i>The Dutch Construction Industry.....</i>	<i>107</i>
4.1.4	<i>The Irish Construction Industry.....</i>	<i>108</i>
4.1.5	<i>The Portuguese Construction Industry.....</i>	<i>109</i>
4.1.6	<i>The Swiss Construction Industry.....</i>	<i>110</i>
4.2	MATERIAL TRENDS AFFECTING THE INSULATION MARKET .....	111
4.2.1	<i>Mineral Fibre.....</i>	<i>111</i>
4.2.2	<i>EPS/XPS.....</i>	<i>112</i>
4.2.3	<i>PU/PIR.....</i>	<i>112</i>
4.2.4	<i>Phenolics.....</i>	<i>112</i>
4.2.5	<i>Flexible Insulation ENR &amp; PE.....</i>	<i>112</i>
<b>5.</b>	<b>SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS .....</b>	<b>113</b>
5.1	MARKET SHARES OF LEADING INSULATION SUPPLIERS .....	113
5.1.1	<i>Austria.....</i>	<i>113</i>
5.1.2	<i>Benelux.....</i>	<i>115</i>
5.1.3	<i>Ireland.....</i>	<i>116</i>
5.1.4	<i>Portugal .....</i>	<i>117</i>
5.1.5	<i>Switzerland.....</i>	<i>118</i>
5.2	PROFILES OF KEY EUROPEAN SUPPLIERS .....	119
5.2.1	<i>Armacell.....</i>	<i>119</i>
5.2.2	<i>BASF .....</i>	<i>122</i>
5.2.3	<i>CRH.....</i>	<i>126</i>

5.2.4	<i>Dow Chemical</i> .....	129
5.2.5	<i>Heraklith AG (Knauf Group)</i> .....	132
5.2.6	<i>Kingspan</i> .....	135
5.2.7	<i>Knauf Insulation</i> .....	138
5.2.8	<i>URSA</i> .....	140
5.2.9	<i>Recticel</i> .....	143
5.2.10	<i>Rockwool</i> .....	146
5.2.11	<i>Saint-Gobain Isover</i> .....	149
5.3	<b>DIRECTORY OF SUPPLIERS</b> .....	152
5.3.1	<i>Austria</i> .....	152
	<i>Expanded Polystyrene</i> .....	152
	<i>Extruded Polystyrene</i> .....	152
	<i>Mineral Fibre</i> .....	153
	<i>PU/Polyisocyanurate</i> .....	153
5.3.2	<i>Belgium</i> .....	154
	<i>Expanded Polystyrene</i> .....	154
	<i>Flexible Insulation (ENR)</i> .....	155
	<i>Flexible Insulation (PE)</i> .....	155
	<i>Microporous Silica</i> .....	155
	<i>Mineral Fibre</i> .....	156
	<i>PU/Polyisocyanurate</i> .....	157
5.3.3	<i>Ireland</i> .....	158
	<i>Expanded Polystyrene</i> .....	158
	<i>Extruded Polystyrene</i> .....	158
	<i>Mineral Fibre</i> .....	159
	<i>Phenolics</i> .....	159
	<i>PU/Polyisocyanurate</i> .....	159
5.3.4	<i>Portugal</i> .....	159
	<i>Expanded Polystyrene</i> .....	159
	<i>Extruded Polystyrene</i> .....	160
	<i>Mineral Fibre</i> .....	160
	<i>Polyurethane</i> .....	160
5.3.5	<i>Netherlands</i> .....	160
	<i>Expanded Polystyrene</i> .....	160
	<i>Extruded Polystyrene</i> .....	161
	<i>Flexible Insulation (PE)</i> .....	162
	<i>Flexible Insulation (PE)</i> .....	162
	<i>Mineral Fibres</i> .....	162
	<i>Phenolics</i> .....	163
	<i>PU/Polyisocyanurate</i> .....	163
5.3.6	<i>Switzerland</i> .....	164
	<i>Expanded polystyrene</i> .....	164
	<i>Extruded Polystyrene</i> .....	165
	<i>Mineral Fibre</i> .....	165
	<i>PU/Polyisocyanurate</i> .....	165
<b>6.</b>	<b>SOURCES OF INFORMATION</b> .....	<b>167</b>
6.1	<b>AUSTRIA</b> .....	167
6.2	<b>BELGIUM</b> .....	167
6.3	<b>CZECH REPUBLIC</b> .....	167
6.4	<b>DENMARK</b> .....	167
6.5	<b>FINLAND</b> .....	168
6.6	<b>FRANCE</b> .....	168
6.7	<b>GERMANY</b> .....	168
6.8	<b>ITALY</b> .....	169
6.9	<b>NETHERLANDS</b> .....	169
6.10	<b>NORWAY</b> .....	169
6.11	<b>POLAND</b> .....	170
6.12	<b>ROMANIA</b> .....	170
6.13	<b>RUSSIA</b> .....	171
6.14	<b>SLOVENIA</b> .....	171
6.15	<b>SPAIN</b> .....	171
6.16	<b>SWEDEN</b> .....	172

6.17	SWITZERLAND .....	172
6.18	UNITED KINGDOM.....	172
<b>7.</b>	<b>ACKNOWLEDGEMENTS.....</b>	<b>175</b>

## TABLE OF TABLES

<b>1.</b>	<b>INTRODUCTION.....</b>	<b>1</b>
1.1	SCOPE OF THE STUDY .....	1
1.2	METHODOLOGY.....	1
1.3	PRODUCTS COVERED .....	1
1.4	END-USE SECTORS .....	4
1.5	PRICES .....	5
	Other Countries – Average Prices, €/m <sup>3</sup> (2005).....	6
	Austria -Prices Used, €/m <sup>3</sup> (2005).....	7
	Benelux - Prices Used, €/m <sup>3</sup> (2005).....	8
	Ireland - Prices Used, €/m <sup>3</sup> (2005).....	9
	Portugal - Prices Used, €/m <sup>3</sup> (2005) .....	10
	Switzerland - Prices Used, €/m <sup>3</sup> (2005).....	11
1.6	UNITS OF VOLUME.....	12
	Other Countries – Average Densities, kg/m <sup>3</sup> (2005).....	13
	Austria - Densities Used, kg/m <sup>3</sup> (2005) .....	14
	Benelux - Densities Used, kg/m <sup>3</sup> (2005).....	15
	Ireland - Densities Used, kg/m <sup>3</sup> (2005).....	16
	Portugal - Densities Used, kg/m <sup>3</sup> (2005).....	17
	Switzerland - Densities Used, kg/m <sup>3</sup> (2005) .....	18
1.7	FORECASTS .....	19
<b>2.</b>	<b>MARKET SUMMARY AND FORECAST TO 2010.....</b>	<b>21</b>
2.1	MARKET REVIEW – 2005 .....	21
	Total Other Western European Countries Thermal Insulation Markets Volume by Type and End-use, 2005 (m <sup>3</sup> ).....	21
	Total Other Western European Countries Thermal Insulation Markets Volume by Type and End-use, 2005 (Tonnes).....	22
	Total Other Western European Countries Thermal Insulation Markets Value by Type and End-use, 2005 (€ Million).....	23
	Total Austrian Thermal Insulation Market Volume by Type and End-use, 2005 (m <sup>3</sup> ).....	24
	Total Austrian Thermal Insulation Market Volume by Type and End-use, 2005 (Tonnes).....	25
	Total Austrian Thermal Insulation Market Value by Type and End-use, 2005 (€Million).....	26
	Total Benelux Thermal Insulation Market Volume by Type and End-use, 2005 (m <sup>3</sup> ).....	27
	Total Benelux Thermal Insulation Market Volume by Type and End-use, 2005 (Tonnes) .....	28
	Total Benelux Thermal Insulation Market Value by Type and End-use, 2005 (€Million) .....	29
	Total Irish Thermal Insulation Market Volume by Type and End-use, 2005 (m <sup>3</sup> ) .....	30
	Total Irish Thermal Insulation Market Volume by Type and End-use, 2005 (Tonnes) .....	31
	Total Irish Thermal Insulation Market Value by Type and End-use, 2005 (€Million) .....	32
	Total Portuguese Thermal Insulation Market Volume by Type and End-use, 2005 (m <sup>3</sup> ) .....	33
	Total Portuguese Thermal Insulation Market Volume by Type and End-use, 2005 (Tonnes).....	34
	Total Portuguese Thermal Insulation Market Value by Type and End-use, 2005 (€Million) .....	35
	Total Swiss Thermal Insulation Market Volume by Type and End-use, 2005 (m <sup>3</sup> ) .....	36
	Total Swiss Thermal Insulation Market Volume by Type and End-use, 2005 (Tonnes) .....	37
	Total Swiss Thermal Insulation Market Value by Type and End-use, 2005 (€Million) .....	38
2.2	MARKET FORECAST – 2010.....	39
	Total Other Western European Countries Thermal Insulation Markets Volume by Type and End-use, 2010 (m <sup>3</sup> ).....	39
	Total Other Western European Countries Thermal Insulation Markets Volume by Type and End-use, 2010 (Tonnes).....	40
	Total Other Western European Countries Thermal Insulation Markets Value by Type and End-use, 2010 (€ Million).....	41
	Total Austrian Thermal Insulation Market Volume by Type and End-use, 2010 (m <sup>3</sup> ).....	42
	Total Austrian Thermal Insulation Market Volume by Type and End-use, 2010 (Tonnes).....	43
	Total Austrian Thermal Insulation Market Value by Type and End-use, 2010 (€Million).....	44
	Total Benelux Thermal Insulation Market Volume by Type and End-use, 2010 (m <sup>3</sup> ).....	45
	Total Benelux Thermal Insulation Market Volume by Type and End-use, 2010 (Tonnes) .....	46
	Total Benelux Thermal Insulation Market Value by Type and End-use, 2010 (€Million) .....	47
	Total Irish Thermal Insulation Market Volume by Type and End-use, 2010 (m <sup>3</sup> ) .....	48
	Total Irish Thermal Insulation Market Volume by Type and End-use, 2010 (Tonnes) .....	49
	Total Irish Thermal Insulation Market Value by Type and End-use, 2010 (€Million) .....	50

	Total Portuguese Thermal Insulation Market Volume by Type and End-use, 2010 (m <sup>3</sup> ) .....	51
	Total Portuguese Thermal Insulation Market Volume by Type and End-use, 2010 (Tonnes) .....	52
	Total Portuguese Thermal Insulation Market Value by Type and End-use, 2010 (€Million) .....	53
	Total Swiss Thermal Insulation Market Volume by Type and End-use, 2010 (m <sup>3</sup> ) .....	54
	Total Swiss Thermal Insulation Market Volume by Type and End-use, 2010 (Tonnes) .....	55
	Total Swiss Thermal Insulation Market Value by Type and End-use, 2010 (SFr Million).....	56
<b>3.</b>	<b>MARKET REVIEW .....</b>	<b>57</b>
3.1	<b>OTHER WESTERN EUROPEAN COUNTRIES BY MATERIAL TYPE – 2005-2010 .....</b>	<b>57</b>
	Other Western European Countries Thermal Insulation Markets by Type, 2005-2010 (m <sup>3</sup> ) .....	57
	Other Western European Countries Thermal Insulation Markets by Type, 2005-2010 (Tonnes).....	57
	Other Western European Countries Thermal Insulation Markets by Type, 2005-2010 (€Million).....	58
3.2	<b>OTHER WESTERN EUROPEAN COUNTRY MARKET BY END-USE APPLICATION – 2005-2010.....</b>	<b>59</b>
	Other Western European Countries Thermal Insulation Markets by End-use, 2005-2010 (m <sup>3</sup> ) .....	59
	Other Western European Countries Thermal Insulation Markets by End-use, 2005-2010 (Tonnes) .....	59
	Other Western European Countries Thermal Insulation Markets by End-use, 2005-2010 (€Million).....	60
3.3	<b>OTHER WESTERN EUROPEAN COUNTRIES MARKET IN BUILDING &amp; INDUSTRY – 2005 .....</b>	<b>61</b>
	Other Western European Countries Markets for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ).....	61
	Other Western European Countries Markets for Thermal Insulation in Building and Industry, 2005 (Tonnes).....	61
	Other Western European Countries Markets for Thermal Insulation in Building and Industry, 2005 (€Million).....	62
3.4	<b>OTHER WESTERN EUROPEAN COUNTRIES GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....</b>	<b>63</b>
	% Growth Rates for Thermal Insulation by Material Type in Other Western European Countries, 2005-2010 (m <sup>3</sup> )..	63
	% Growth Rates for Thermal Insulation by Material Type in Other Western European Countries, 2005-2010 (Tonnes).....	63
3.5	<b>OTHER WESTERN EUROPEAN COUNTRIES GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2005-2010 .....</b>	<b>64</b>
	% Growth Rates for Thermal Insulation by End-use in Other Western European Countries, 2005-2010 (m <sup>3</sup> ) .....	64
	% Growth Rates for Thermal Insulation by End-use in Other Western European Countries, 2005-2010 (Tonnes) ...	64
3.6	<b>THE AUSTRIAN MARKET BY MATERIAL TYPE - 2005-2010.....</b>	<b>65</b>
	The Austrian Thermal Insulation Market by Type 2005-2010 (m <sup>3</sup> ) .....	65
	The Austrian Thermal Insulation Market by Type, 2005-2010 (Tonnes) .....	65
	The Austrian Thermal Insulation Market by Type, 2005-2010 (€Million).....	66
3.7	<b>THE AUSTRIAN MARKET BY END-USE APPLICATION - 2005-2010 .....</b>	<b>67</b>
	The Austrian Thermal Insulation Market by End-use, 2005-2010 (m <sup>3</sup> ).....	67
	The Austrian Thermal Insulation Market by End-use, 2005-2010 (Tonnes) .....	67
	The Austrian Thermal Insulation Market by End-use, 2005-2010 (€Million) .....	68
3.8	<b>THE AUSTRIAN MARKET IN BUILDING &amp; INDUSTRY – 2005.....</b>	<b>69</b>
	The Austrian Market for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ) .....	69
	The Austrian Market for Thermal Insulation in Building and Industry 2005 (Tonnes) .....	69
	The Austrian Market for Thermal Insulation in Building and Industry, 2005 (€Million).....	70
3.9	<b>AUSTRIAN GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010 .....</b>	<b>71</b>
	% Growth Rates for Thermal Insulation by Material Type in Austria, 2005-2010 (m <sup>3</sup> ).....	71
	% Growth Rates for Thermal Insulation by Material Type in Austria, 2005-2010 (Tonnes).....	71
3.10	<b>AUSTRIAN GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010 ..</b>	<b>72</b>
	% Growth Rates for Thermal Insulation by End-use in Austria, 2005-2010 (m <sup>3</sup> ) .....	72
	% Growth Rates for Thermal Insulation by End-use in Austria, 2005-2010 (Tonnes) .....	72
3.11	<b>THE BENELUX MARKET BY MATERIAL TYPE – 2005-2010 .....</b>	<b>73</b>
	The Benelux Thermal Insulation Market by Type, 2005-2010 (m <sup>3</sup> ).....	73
	The Benelux Thermal Insulation Market by Type, 2005-2010 (Tonnes).....	73
	The Benelux Thermal Insulation Market by Type, 2005-2010 (€Million) .....	74
3.12	<b>THE BENELUX MARKET BY END-USE APPLICATION – 2005-2010.....</b>	<b>75</b>
	The Benelux Thermal Insulation Market by End-use, 2005-2010 (m <sup>3</sup> ).....	75
	The Benelux Thermal Insulation Market by End-use, 2005-2010 (Tonnes).....	75
	The Benelux Thermal Insulation Market by End-use, 2005-2010 (€Million).....	76
3.13	<b>THE BENELUX MARKET IN BUILDING &amp; INDUSTRY - 2005.....</b>	<b>77</b>
	The Benelux Market for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ).....	77
	The Benelux Market for Thermal Insulation in Building and Industry, 2005 (Tonnes).....	77
	The Benelux Market for Thermal Insulation in Building and Industry, 2005 (€Million) .....	78
3.14	<b>BENELUX GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010 .....</b>	<b>79</b>
	% Growth Rates for Thermal Insulation by Material Type in Benelux, 2005-2010 (m <sup>3</sup> ) .....	79

	% Growth Rates for Thermal Insulation by Material Type in Benelux, 2005-2010 (Tonnes).....	79
3.15	BENELUX GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010....	80
	% Growth Rates for Thermal Insulation by End-use in Benelux, 2005-2010 (m <sup>3</sup> ).....	80
	% Growth Rates for Thermal Insulation by End-use in Benelux, 2005-2010 (Tonnes).....	80
3.16	THE IRISH MARKET BY MATERIAL TYPE – 2005-2010.....	81
	The Irish Thermal Insulation Market by Type, 2005-2010 (m <sup>3</sup> ).....	81
	The Irish Thermal Insulation Market by Type, 2005-2010 (Tonnes).....	82
	The Irish Thermal Insulation Market by Type, 2005-2010 (€Million).....	82
3.17	THE IRISH MARKET BY END-USE APPLICATION – 2005-2010.....	83
	The Irish Thermal Insulation Market by End-use, 2005-2010 (m <sup>3</sup> ).....	83
	The Irish Thermal Insulation Market by End-use, 2005-2010 (Tonnes).....	83
	The Irish Thermal Insulation Market by End-use, 2005-2010 (€Million).....	84
3.18	THE IRISH MARKET IN BUILDING & INDUSTRY - 2005.....	85
	The Irish Market for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ).....	85
	The Irish Market for Thermal Insulation in Building and Industry, 2005 (Tonnes).....	85
	The Irish Market for Thermal Insulation in Building and Industry, 2005 (€Million).....	86
3.19	IRISH GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	87
	% Growth Rates for Thermal Insulation by Material Type in Ireland, 2005-2010 (m <sup>3</sup> ).....	87
	% Growth Rates for Thermal Insulation by Material Type in Ireland, 2005-2010 (Tonnes).....	87
3.20	IRISH GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010.....	88
	% Growth Rates for Thermal Insulation by End-use in Ireland, 2005-2010 (m <sup>3</sup> ).....	88
	% Growth Rates for Thermal Insulation by End-use in Ireland, 2005-2010 (Tonnes).....	88
3.21	THE PORTUGUESE MARKET BY MATERIAL TYPE – 2005-2010.....	89
	The Portuguese Thermal Insulation Market by Type, 2005-2010 (m <sup>3</sup> ).....	89
	The Portuguese Thermal Insulation Market by Type, 2005-2010 (Tonnes).....	89
	The Portuguese Thermal Insulation Market by Type, 2005-2010 (€Million).....	90
3.22	THE PORTUGUESE MARKET BY END-USE APPLICATION – 2005-2010.....	91
	The Portuguese Thermal Insulation Market by End-use, 2005-2010 (m <sup>3</sup> ).....	91
	The Portuguese Thermal Insulation Market by End-use, 2005-2010 (Tonnes).....	91
	The Portuguese Thermal Insulation Market by End-use, 2005-2010 (€Million).....	92
3.23	THE PORTUGUESE MARKET IN BUILDING & INDUSTRY - 2005.....	93
	The Portuguese Market for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ).....	93
	The Portuguese Market for Thermal Insulation in Building and Industry, 2005 (Tonnes).....	93
	The Portuguese Market for Thermal Insulation in Building and Industry, 2005 (€Million).....	94
3.24	PORTUGUESE GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	95
	% Growth Rates for Thermal Insulation by Material Type in Portugal, 2005-2010 (m <sup>3</sup> ).....	95
	% Growth Rates for Thermal Insulation by Material Type in Portugal, 2005-2010 (Tonnes).....	95
3.25	PORTUGUESE GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010.....	96
	% Growth Rates for Thermal Insulation by End-use in Portugal, 2005-2010 (m <sup>3</sup> ).....	96
	% Growth Rates for Thermal Insulation by End-use in Portugal, 2005-2010 (Tonnes).....	96
3.26	THE SWISS MARKET BY MATERIAL TYPE – 2005-2010.....	97
	The Swiss Thermal Insulation Market by Type, 2005-2010 (m <sup>3</sup> ).....	97
	The Swiss Thermal Insulation Market by Type, 2005-2010 (Tonnes).....	97
	The Swiss Thermal Insulation Market by Type, 2005-2010 (SFr Million).....	98
3.27	THE SWISS MARKET BY END-USE APPLICATION – 2005-2010.....	99
	The Swiss Thermal Insulation Market by End-use, 2005-2010 (m <sup>3</sup> ).....	99
	The Swiss Thermal Insulation Market by End-use, 2005-2010 (Tonnes).....	99
	The Swiss Thermal Insulation Market by End-use, 2005-2010 (€Million).....	100
3.28	THE SWISS MARKET IN BUILDING & INDUSTRY - 2005.....	101
	The Swiss Market for Thermal Insulation in Building and Industry, 2005 (m <sup>3</sup> ).....	101
	The Swiss Market for Thermal Insulation in Building and Industry, 2005 (Tonnes).....	101
	The Swiss Market for Thermal Insulation in Building and Industry, 2005 (SFr Million).....	102
3.29	SWISS GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2005-2010.....	103
	% Growth Rates for Thermal Insulation by Material Type in Switzerland, 2005-2010 (m <sup>3</sup> ).....	103
	% Growth Rates for Thermal Insulation by Material Type in Switzerland, 2005-2010 (Tonnes).....	103
3.30	SWISS GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE 2005-2010.....	104
	% Growth Rates for Thermal Insulation by End-use in Switzerland, 2005-2010 (m <sup>3</sup> ).....	104
	% Growth Rates for Thermal Insulation by End-use in Switzerland, 2005-2010 (Tonnes).....	104
<b>4.</b>	<b>MARKET INFLUENCES.....</b>	<b>105</b>

4.1	MACROECONOMIC TRENDS .....	105
	Construction Volume in Austria by Type, 2004-2007 (€Million/Annual % change) .....	105
	Construction Volume in Belgium by Type, 2004-2007 (€Million/Annual % change) .....	106
	Construction Volume in Netherlands by Type, 2004-2007 (€Million/Annual % change).....	107
	Construction Volume in Ireland by Type, 2004-2007 (€Million/Annual % change).....	108
	Construction Volume in Portugal by Type, 2004-2007 (€Million/Annual % change).....	109
	Construction Volume in Switzerland by Type, 2004-2007 (€Million/Annual % change) .....	110
4.2	MATERIAL TRENDS AFFECTING THE INSULATION MARKET .....	111
<b>5.</b>	<b>SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS .....</b>	<b>113</b>
5.1	MARKET SHARES OF LEADING INSULATION SUPPLIERS .....	113
	Leading Austrian Suppliers of Thermal Insulation .....	113
	Leading Benelux Suppliers of Thermal Insulation .....	115
	Leading Portuguese Suppliers of Thermal Insulation .....	117
	Leading Swiss Suppliers of Thermal Insulation .....	118
5.2	PROFILES OF KEY EUROPEAN SUPPLIERS .....	119
	BASF Group Sales by Business Segment, 2003 & 2004 (€Million).....	123
	BASF Group Sales by Location of Customer, 2004 & 2005 (€Million).....	123
	BASF Plastics Division Sales, 2003-2005 (€Million) .....	124
	CRH Group Sales by Region, 2003-2004 (€Million)* .....	127
	CRH Group: Sales by Business Segment, 2003-2004 (€Million)* .....	127
	The Dow Chemical Company: Group Sales by Region, 2003-2005 (US\$ Million)* .....	130
	The Dow Chemical Company Group: Sales by Business Segment, 2003-2005 (US\$ Million)* .....	130
	Dow's European Manufacturing Sites for Styrofoam and Polyurethanes.....	131
	RHI's Sales by Division, 2003-2005 (€Million).....	132
	Heraklith's Sales by Product Type, 2004 (%).....	133
	Heraklith's Sales by Region, 2004 (%).....	133
	Uralita's Financial Results by Business Group, 2004 (%).....	141
	URSA's Sales by Product Type, 2004 (%).....	141
	URSA Sales by Geographic Region, 2004 (%) .....	141
	Recticel International: Net Sales by Business Segment, 2003-2005 (€Million) .....	144
	Rockwool Sales by Region, 2005 (%) .....	147
5.3	DIRECTORY OF SUPPLIERS .....	152
<b>6.</b>	<b>SOURCES OF INFORMATION.....</b>	<b>167</b>
6.1	AUSTRIA .....	167
6.2	BELGIUM .....	167
6.3	CZECH REPUBLIC .....	167
6.4	DENMARK .....	167
6.5	FINLAND .....	168
6.6	FRANCE.....	168
6.7	GERMANY .....	168
6.8	ITALY.....	169
6.9	NETHERLANDS.....	169
6.10	NORWAY.....	169
6.11	POLAND .....	170
6.12	ROMANIA.....	170
6.13	RUSSIA .....	171
6.14	SLOVENIA.....	171
6.15	SPAIN.....	171
6.16	SWEDEN.....	172
6.17	SWITZERLAND .....	172
6.18	UNITED KINGDOM.....	172
<b>7.</b>	<b>ACKNOWLEDGEMENTS.....</b>	<b>175</b>